

Coordinators' Guide 2004-2005

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Thank YOU for Helping!

There are many ways to give.

The time and energy you put into this campaign are a wonderful way to give. Thank you for helping make it happen.

Our transition to electronic pledging in 2003-2004 was a success, and we think you'll be pleased with our ongoing improvements! The time and money saved with an online system, benefits everyone. Your feedback is important so we can continue to make our program even better. Let us know your thoughts (feedback@dhr.idaho.gov.)

So, what's new with this year's campaign?

The campaign is 75% of the way to being completely paper free. In the next two years, we hope to have the process linked with IPOPS making the process easier for you and your agency.

The Coordinator's Guidebook has been updated this year and should help you with planning at whatever level your agency wants to participate. Members of the State Employees Campaign (SEC) Leadership Team would be glad to brainstorm ideas with you over the phone or in a meeting. They

• love to share their expertise! See the contact information in this guidebook.

The State Employees Campaign site located at www.sec.idaho.gov has been updated. On that link you will find a step-by-step instruction sheet for online pledging. You may want to copy this page

• to give to your employees.

Once again, the campaign is statewide and building on local relationships. Our campaign will
 reflect the theme of one employer, one team, and we will track our success as a state.

Your role is even more critical this year than in past years. Helping employees access their options to donate, using the eway pledge site, and reminding them to print their final donation form are

• paramount to our campaign's success.

The awards have changed. Once again, we will recognize our Governor's Silver Leadership Team (1/2%) with a certificate. Our Governor's Gold Leadership Team (1%) will receive a token of apprecia-

tion for their generosity.

There is a simpler log-in process for Pledge Online. The information entered on this site is secure.



Again, THANK YOU for volunteering to help with the State Employees Campaign. We could not do it without you. Your role involves the following:

- · Attending Coordinator Training and the Campaign Kick-off Event in late September.
- Getting to know the campaign materials and web site; familiarizing yourself with online pledging.
- · Coordinating and carrying out your agency's campaign, whether small or large. (This guide is designed to help you!)
- · Creating a personal connection between the State Employees Campaign and your employees through an agency campaign or promotion.
- · Communicating the benefits of giving through the combined state campaign.
- Asking employees to <u>consider</u> supporting the State Employees Campaign; <u>never</u> pressuring or demanding.
- · Being sensitive to employee donor recognition and confidentiality issues.
- · Preparing for objections being ready with answers to possible questions or concerns.
- · Winding up your agency's campaign in coordination with your payroll person.
- Thanking employees for their consideration and time whether they participate or not.

Some Important Terms to Know

- State Employees Campaign (SEC) Idaho State Employees' Charitable Giving Campaign designed and managed by and for state employees. It is a one time, annual event for state employees.
- The Campaign Coordinator Each agency chooses a Campaign Coordinator for that year's campaign. The Campaign Coordinators work closely with the statewide SEC leadership team to coordinate their agency's campaign and timelines.
- The SEC Leadership Team This committee, appointed by the Governor, is responsible to manage the annual statewide campaign.
- E-Way Pledge Site This website is maintained by United Way but is customized to the State of Idaho's campaign. Employees may pledge online from this site. They can find this site by going to www.sec.idaho.gov and clicking Pledge Online. There are also links from the Employee Portal (http://employee.idaho.gov/).



The following information may help you answer questions from donors.

The Idaho State Employees Charitable Giving Campaign is the result of Executive Order 2004-04, issued by Governor Kempthorne. This Executive Order provides:

- Opportunities for employees to contribute to their community through nonprofit organizations of their choice;
- Appointment of a campaign leadership team of state employees who establish policy and govern the campaign;
- Campaigns will minimize workplace disruptions and administrative costs to taxpayers.

Campaign Administration

Through a Memorandum of Understanding, your campaign leadership has selected United Way of Treasure Valley for this year's campaign administrator and fiscal agent. Through outstanding coordination between the Idaho State Employees Charitable Giving Campaign Leadership Team and United Way of Treasure Valley, we are pleased to continue to offer low cost, on-line pledging. The reduced campaign costs mean more of your gift goes directly to help charities. This year's Idaho State Employees Charitable Giving Campaign will have a 7% processing fee. Local United Way agencies across the state may add a pledge loss percentage appropriate to their local area. Each charity designated to receive money is notified at the conclusion of the campaign of the amount they are to receive. Donations are distributed quarterly.

Other Federations do have agreements with their members to take a small part of donations to cover administrative expenses. This year, Idaho Choices in Community Giving's share will be 12 %. Global Impact (aka International Service Agencies) will also be 12 %. Agencies who belong to the federation choose to because it helps them reduce their own overhead costs. Member agencies consider the federation/association as extensions of their internal fundraising staff.

By partnering with federations/associations, charities avoid costs associated with advertising, direct mail, and telephone solicitation. More of any dollar donated to the charity goes to its mission when fundraising costs are minimized.



- Something or someone touched their lives
- They want to give back to society
- They believe in or are involved in a cause
- Others around them are giving
- The climate is right
- Because they were asked



- 1. **Become familiar with the role** your agency would like you to take in leading the campaign. Review this guide; visit with your agency's previous coordinator(s); talk with one of the SEC Leadership Team members, visit the state's website at www.sec.idaho.gov. Be sure to check out the link to Information for Coordinators; many of the forms and instructions you will need are located there.
- 2. **Involve top management.** Getting enthusiastic support from the top is key to the success of your agency's campaign. Discuss campaign ideas and gain management's endorsement before you start the campaign. Discuss ways to give visibility to the campaign through upcoming meetings and communications. Keep top management informed of campaign plans to ensure their support.
- 3. **Develop a plan.** Establish a concentrated campaign period of 1-2 weeks. Organize a team, recruit one or two people to work with you on the campaign. Meet regularly, develop a strategy and timelines.
- 4. Remind employees to pledge online. Remember, online pledging saves money!

5. Involve Payroll.

Online Option: Instructions for online pledging are available for employees at www.sec.idaho.gov/info.htm. Employees who choose to pledge online will give a hard copy of their online pledge form to you who in turn will forward it to payroll for entry into IPOPS. If an employee does not print a copy of their final pledge donation for payroll, the e-Way pledge will not get entered into the IPOPS system.

Paper Option: For employees who do not have access to the internet and who use paper pledge forms, payroll will need to data enter their information into IPOPS.

As Campaign Coordinator, you collect all paper pledge forms. Ask if your payroll person has questions about the online pledge forms, their responsibilities, your roles and assistance you may give, and information necessary to create employee deductions.

6. **Paper Copies.** If online access to the pledge form is not available to all or some of your employees, use the 3 EZ Ways to Pledge form (available from www.sec.state.id.us). Distribute that form in employees' inboxes or mailboxes and collect them on a prede-

termined date.

- 7. **Communicate the plan**. Let employees know about the campaign via meetings, emails, posters, web site messages. Keep communication going. Help employees who are hesitant with technology to use the online pledge system. Sample emails are in this guide, as well as sample graphics for posters.
- 8. **Conduct the campaign**. When it is time to actually conduct the campaign, promote it with posters, emails, newsletters, memos. Make it fun to give. Hold a kick off event in your agency and invite everyone. Make campaign dates and deadlines clear; help employees use the online pledge system.
- 9. Conduct a thorough **campaign wrap up.** Check with payroll throughout the campaign regarding receipt of paper copies of completed online pledge summaries from employees. Work with payroll to ensure deductions are appropriately completed and that both eWay and IPOPS entries have been made for each donation. Complete the two report forms available on www.sec.idaho.gov under Information for Coordinators. Report the results to your Administrator/Director. Thank everyone for participating!
- 10. **Come together** for a good cause, have fun raising awareness of the campaign. This is a great opportunity to build morale.

Important Dates:

September 29, 2004 - Campaign Coordinator Training, 8:30 a.m., Joe R. Williams Building, Boise October 19, 2004 - Governor's Kempthorne's Campaign Kick-Off Message to state employees November 9, 2004 - Campaign closes

November 15, 2004 - Report envelopes due in to your local United Way; paperwork due to payroll personnel

Understanding How the Electronic Campaign Works

- 1. As Campaign Coordinator you send emails to your agency's employees describing the campaign, campaign dates and activities, and the pledging options.
- 2. If an employee wishes to be a donor online, they get on the Internet, go to the Idaho State Employees Campaign site www.sec.idaho.gov and click the Pledge Online button. This takes them to United Way's "eWay" site.
- 3. The donor is now on a secure (encrypted) eWay page. Here the donor will enter the following:
 - a. User name of the donor's choice
 - b. Password of their choice Must be between 6 and 15 characters, 2 of which are numbers

- c. They must remember this information if they want to return to the site later to change donation information.
- d. Phone can be entered without dashes or parentheses; just 10 numbers
- e. The donor must complete all fields marked with an asterisk.
- 4. The next page is Idaho's own eWay page. It contains a message from the Governor and a several links including Campaign News, a campaign calendar, leadership giving information, FAQs, and "Pledge Now".
- 5. Click on Pledge Now and the donor will see the first of a series of screens where the donor may choose specific charities, amount pledged, etc.
- 6. To see the next screen in the series, the donor clicks on "Continue".
- 7. When the donor has finished all the donation screens, they click "Submit Donation." They must then print a "Confirmation Receipt" by clicking on the "Review/Print Confirmation Receipt" link.
- 8. Once the "Submit" button has been clicked and a paper copy has been printed, the donor will click "Logout" to leave the site.
- 9. The donor should give the paper copy of their Confirmation Receipt to you as the Campaign Coordinator for their agency. Remember, this information given to you is confidential; it should only be shared with your agency payroll person. The donor will need to make a photocopy for his own records.
- As the Campaign Coordinator you may take the paper copies of the confirmation receipts received from donors to the agency payroll person for entry into the IPOPS system.
- 11. United Way will reconcile the online pledge submissions with your agency's payroll report for matches. If entries on IPOPS and United Way do not match, donor information will be given to the campaign coordinators (by agency) to determine if an online e-way pledge submission is required or an IPOPS entry submitted.



Your goal is to get campaign information to employees, encouraging them to make a contribution, if possible. Your campaign should reflect the personality and culture of your agency and its employees. Campaigns can be fun, educational, and informative – and they will differ from agency to agency, and from year to year. Whatever theme or process you choose, employees should feel encouraged not mandated to participate. Listed below are various approaches:



Help! I have very limited time!

Suggestion: Hold a 30-minute meeting or add this to an existing staff meeting **The One-Meeting Campaign**:

(Sample 30-Minute Employee Meeting)

- · Agency Coordinator welcomes the group.
- · Agency Director/Administrator affirms the agency's support of the campaign.
- · Show your local United Way video.
- Featured Speaker: speakers from charitable organizations in your area are available to describe how United Way has helped their agency and the impact that one gift makes.
 The featured speaker could involve a fellow employee sharing a personal experience with a non-profit organization (ask them to limit their remarks to your time constraints).
- · Discuss the agency campaign schedule and planned activities.
- Agency Coordinator wraps up the meeting by answering questions, referring to the SEC e-Way Website, describing the online pledge process, and thanking everyone.
- To add fun, place a dot on the bottom of one or two chairs and award a simple, low-cost prize to the employee(s) who choose those seats and stay through the meeting.
- · Serve popcorn at the meeting!
- Follow up with email reminders to employees throughout the campaign (see samples in this guide).

Bare Bones Campaign:

Talk with your administrator or director to obtain support for the campaign. Promote the campaign via one-on-one visits with your agency employees, email, phone, or as an agenda item on an existing meeting schedule. Continue follow through with emails, handouts, and newsletters. Stay in contact with your agency payroll person to communicate campaign issues, and questions.

I want to do more than just have a meeting, but I don't know where to start or how involved to get!?

Suggestion: Have a variety of activities throughout your agency's campaign timeline. Get a small group to help you. As a group, decide to which charity(s) the money raised will be donated. Be sure to report back to the employees and thank the participants.

- · Sell "Casual Day" passes for \$1, allowing that employee to dress down for a day
- · Have an Ice Cream Social;
- Have a Progressive Potluck with different courses in different rooms of the office, each room featuring a different charity display;
- · Sponsor a Bake Sale in a high traffic area;
- Serve a Pancake Breakfast as part of your agency kick-off;
- Sponsor a Director's Carwash...employees pay to have the Director, or top management wash their cars;
- Hold a Silent Auction and invite people external to your agency; employees may donate items or you may ask businesses for donated items;
- Hold a Lunch Box or Gift Basket Auction: employees are asked to create a box lunch or a gift basket. At the end of a staff meeting, all baskets are raffled off;
- · Sell Balloon-o-Grams some have prize coupons inside, others have thank you messages
- Sponsor an Employee Car Wash: employees pay to get their car washed in the parking lot during a work day;
- Have a chili cook off; invite employees to pay \$5 to participate in the lunch and vote for the winner(s). Open the event to outside departments.

We want to go "all out" to support this campaign – what are some ideas?

Suggestion: Design your agency campaign around a theme. Using a theme or special event can generate more interest in the campaign. Make sure your agency head is supportive of specific events and activities.

• Fun events:

Sponsor a Fun Run Have an Office Olympics Have an inter or intra-departmental Golf Tournament Sponsor a Bake Sale Sponsor a Tricycle Race Have an Ugly Hat or Ugly Tie Contest If the agency's campaign makes goal, management could promise one of the following will happen:

Pie in the Eye Event Executive Shoe Shine Executive Kiss the Pig

Fun Campaign Themes (see the last section of this guide)

Football Season

Bees Fish Fall Season Counting on You

"Hunting" for Donations



Suggestion: If you have a small agency, talk one-on-one with each employee. Discuss the campaign, answer questions, help with online pledging. If your agency is large, use technology to assist in getting the job done. Send out emails on a regular basis and do a walk around once a week to be available to employees with questions. Have a visible barometer or graph that employees can see as you track donations. The barometer may be on a wall in a conference room and may be an attachment to your ongoing emails. The entire state's barometer is on the e-Way pledge site.



Idaho's State Employee Campaign Leadership Team 2004-2005

Winston Wiggins, Campaign Chair Director Department of Lands 334-0238 wwiggins@idl.state.id.us

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United Way resources available through your local United Way office (see list below):

Locally produced video; List of potential SEC charitable organization speakers

The flollowing list of local United Way offices may be a resource to you.

United Way Office in

Southwestern Idaho United Way of Treasure Valley Sally Zive, 208-336-1070 szive@unitedwaytv.org

Southeastern Idaho United Way of Southeastern Idaho Margaret Ganyon, 208-232-1389 mganyon@ida.net

Idaho Panhandle United Way of Kootenai County, Inc. Jeff Conroy, 208-667-8112 unitedway@imbris.com

Lewiston Area Twin County United Way Christine Doyle, 208-743-6594 cdoyle@tcuw.org Idaho Falls Area United Way of Idaho Falls & Bonneville Co. Karen Cornwell, 208-522-2674 kcornwell@unitedwayif.org

Southcentral Idaho United Way of Southcentral Idaho Michael Alix, 208-733-4922 uwscid@velocitus.net

Northeastern Idaho United Way of Upper Snake River Valley Rich Ballou, 208-356-5441 rballou@rexburgstandardjournal.com

Moscow Area United Way of Moscow/Latah County 208-882-3474 unitedway@moscow.com

Feedback and Ideas

We would appreciate hearing your ideas; please send your feedback to: feedback@dhr.idaho.gov

Campaign Themes: Add Color & Creativity to Your Campaign

Football

Ideas for Activities

- Throw a tailgate party in the parking lot.
- Hold a Chili cook off.
- Have an in-house lunch with hot dogs, apple cider; employees are asled to sing their favorite team's song (or do a cheer).
- Sponsor a Cheer Leading contest for their favorite football team or cheers about individual work teams or departments.



Ideas for Fundraisers

- UI, ISU, and BSU supporters can form office teams to compete in a lunch hour walkathon; get pledges
 of \$1 per mile.
- Set up a truck and sell tailgate food items outside your office during the noon hour.

Ideas for Illustration

- A truck with the tailgate down; food items on the tailgate and on a stadium blanket on the ground.
- A football stadium full of names of agencies that benefit from the SEC.
- Goal posts with the football passing through them.
- A huddle of players with State Employees on their jerseys and yelling 'Let's go!'

Bees

Ideas for Activities

- Sponsor a "Bee-cause you can make a difference" activity such as a lawn raking team to help elderly/ disabled people with fall leaf pick up.
- Sponsor a "Bee-cause it does matter" activity such as collecting donations to the SEC for a week or two weeks or adopting a family for the campaign.
- Sponsor a "Bees Breakfast" full of things like Honeycomb cereal, bagels and honey. Ask for donations.



Ideas for Fundraisers

- Hold a "Busy Bee" auction of services; coworkers donate car washes, yard raking, dinner cooking.
- Have a "citrus sale" and sell juices or products that involve bees.
- Have a Honey of a Bake Sale; make all the goodies with honey.
- Sell beeswax candles.

Ideas for Illustrations

- Picture of bees and hives.
- The layers of the hive could have groups the SEC helps (families, community, children, elderly); add a little bee to the hive for each \$10 of SEC contributions.
- Cut out bees with the names of charitable agencies written on them and tape them to walls or cubicles throughout the office.

Fish

Ideas for Activities

- Using the theme, "We're all in this pond together", show the movie: "Fish" stressing the attitude of caring. Follow by adding the names of charitable organizations into the big pond. (see above)
- Print fish pictures, ask employees to cut out a fish, color, and label it with their favorite charitable group; employees can tape the fish to the pond on the wall. (see above)

Ideas for Fundraisers

- Sell tickets to fishing pond; prizes are donations or simple items.
- Create a gift basket and sell tickets for a drawing to win the basket of fish related products (tickets to the "reel" theaters, steelheads tickets, fish recipes, BSU football tickets for 'tackling', phone cards for getting people 'on the line', seafood restaurant meal certificate, cans of salmon/tuna, gummy fish and gummy worms, hot rod cars for 'rods'. Proceeds go to the SEC campaign.

Ideas for Illustration

 A pond full of colorful fish bearing names of charitable agencies and or names of each employee in the office; titled 'We're all in this pond together'.

Fall

Ideas for Activities

- Sponsor a Halloween Pumpkin Carving Contest.
- Sponsor a Halloween Costume Contest or luncheon.
- Bring in an SEC speaker to address needs of specific agencies.
- Build a haunted house; sell tickets for employees and children to go through.

Ideas for Fundraisers

- Have a "Fall Clean Up the Garage Sale" with profits going to the SEC. Employees can bring 'rummage'
 to work and hold a sale for internal or external customers.
- Sponsor a Halloween Wilted Flower Bouquet sale. Collect wilted flowers from area florists; employees donate to have a wilted bouquet sent to another employee on Halloween.
- Sponsor an Office Trick or Treat ask employees to donate money they would normally spend on Halloween Candy.

Ideas for Illustration

- Oktoberfest
- Colorful leaves and trees
- Halloween pictures



"Hunting" for Donations

Ideas for Activities

- Sponsor a Camouflage Day!
- Hold a scavenger hunt

Ideas for Fundraisers

- Sponsor a duck call or elk bugle contest; contestants make a donation
- Hold a wild game potluck or an elk meat chili cookoff; ask for donations

Ideas for Illustration

- Turkey poster with colored feathers, each representing a charitable organization.
- A Bullseye target with a goal amount in the center

"Counting on You"

Ideas for Activities

 Guessing numbers of things such as pennies in a jar, final agency contributions, fellow employees' siblings.

Ideas for Fundraisers

• Collecting as much money as possible in a large jar.

Ideas for Illustration

- A collage of numbers on a big poster.
- A crowd of faces with one circled or one in color.
- A bean stick person bent over a HUGE jar of beans, counting each one out into another pile to the side.
- Poster of a rocket ship, countdown to last day of the fundraiser.





Sample email from your agency's Chief Executive:

Once again this fall, we are asked to participate in the State Employees Charitable Giving Campaign. This campaign is the time when we pause for a moment or two, to consider contributing to charities that help our communities, our nation, and even our global efforts.

Did you know that charitable organizations receive the majority of their donations through workplace giving in the form of payroll deductions? Workplace giving donations allow the charities to spend more of your donation on their cause, and much less on direct mailing and other advertising to raise money.

Sure, you can always give directly to the charities of your choice, but for many, there is never a good time to do that. Payroll deductions let you support the causes you believe in, in a way that is powerful and affordable. But if you prefer giving a one-time donation, do it during our campaign.

Every day you show your dedication to public service, and I truly appreciate your hard work. I hope you will join me in remembering how much our campaign dollars mean to those charitable agencies who need us so much. Please consider donating whatever you can.

Sample of initial email from Campaign Coordinator to employees:

Please join me in participating in Idaho's State Employees Campaign for Charitable Giving. I am this year's Campaign Coordinator for (insert agency name here).

Our agency's kickoff event will be (insert date, location, and details). Please join in! We're pleased to once again offer an online pledging option. As we did last year, you will need to print a final copy of your donor receipt to give to me, as the Campaign Coordinator; I will forward it on to payroll. We're also continuing to coordinate the campaign statewide so we can work as a team to reach our goals.

United Way is the state campaign's distribution agent for donations (your donation only goes to the United Way organization if you specify that). Our online pledge site is at www.sec.idaho.gov. To pledge, just click Pledge Online. This will take you to a secure site where you may enter your name, password protect your data, and begin the online pledging process. Be sure to print a copy of your final pledge donation summary to give to me.

If you have questions about the campaign,	or if you need assistance with	the online pledging process, I
will be glad to help. My direct number is	or email me at	

This campaign is the only official charitable giving campaign managed by your fellow state employees. Together we can make a difference in our community, our nation, and our world. Giving together matters! Your Agency Coordinator Sample follow up email to Employees: We have _____ weeks (or days) to the end of (insert your agency's name) State Employee Campaign for Charitable Giving (SEC). I hope you have had time to review the online pledge option at www.sec.idaho.gov. If you pledge online this year, remember to print a copy of your donation summary sheet and give it to me. If you need my assistance, please let me know. Our next SEC event is (insert event, date, location). As always, participation in these activities and the campaign is optional but I hope to see you there! Thank you for considering a donation to the SEC Campaign. Giving together matters! Your Agency Coordinator Sample wrap up email to Employees: It is just days to the close of (insert agency name) SEC Campaign. If you haven't had a chance to review the online pledge option, now is the time. Go to www.sec.idaho.gov and click on Pledge Online. Don't forget to make a copy of your final pledge summary sheet for me. phone number is _____, or you may email me at ______.

Remember, our campaign closes on (insert date). If you need my assistance, I would be glad to help. My

Thanks to all of you who have been able to give this year. Your donation makes a huge difference in the lives of others in our community.

Your Agency Coordinator

Sample 'thank you' email to Employees:

Thank you! We had great participation in (insert agency's name here) State Employee Campaign for Charitable Giving. Our participation was (up, or use a total percent).

Thank you for your generosity and caring attitude. Because of you, our community will be a better place to live.

OR
This is a heartfelt thank you to each and every one of you who contributed to this year's State Employee
Campaign for Charitable Giving. Once again, you as state employees have gone the extra mile to help
make (insert area here, e.g., Treasure Valley) a better place for all of us.

Your generous pledge helped us raise a total amount of _____.

Giving together matters!

Your Campaign Coordinator

Your Campaign Coordinator